



Unified Communications

What is the customer trying to achieve?

Are they just looking for replacement services? Is this just POTS/PRI replacement?

[dig deeper]

What software are they using to run their company?

How in-the-cloud are they? Office365, SF, SaaS, IaaS, AWS

Who calls them? How do customers contact them?

Text, click to call, chat, on social media

Is there a department of 3 or more people who does in-bound or outbound?

How do they collaborate?

How often do they have meetings? Conference calls?

[about the Partner]

Who are you targeting – small, medium, large or all of the above?

What does your own company do for UCaaS?

Have you sold UC/VoIP before? Or PBX systems?

4 drivers for UCaaS: Mobility, 4G, iPhone and copper going away.

Opportunity in POTS/PRI replacement, UCaaS, CCaaS, Conferencing, PBX and cellular/4G.

[choosing a UC vendor]

5 Roads to UCaaS: Retail/Agent; White-Label; BYO; Referral; Partner; Opt out

Vendor Prospects: _____



Pros/Cons:

What is important? Reliable, Cheap, Versatile, Local?

What will your customers want most?

Deployment and Service Deliver – must haves:

Most partners choose a vendor for a market segment, like Provider N is good for 5 seats and Provider P is good for 10-50 seats.

What provider have you used or tried?

What have other Partners used?